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ABSTRACT

Designed to serve both as an activity report on Office of Management Services (OMS) progress during 1989 and a catalog of OMS services and products, this annual report focuses on the management of human and technical resources in a scholarly environment. Programs and services are reported in four sections: (1) Applied Research and Development (the Training Program for Preservation Administrators, New Staff Development program, the North American Collections Inventory Project); (2) Organizational Training and Staff Development Program (OMS Adjunct Staff, Basic Management Skills Institute, Advanced Management Skills Institute, Creativity to Innovation, Library Analytical Skills Institute, Managing the Learning Process, Management Institute for Assistant/Associate Directors, Special Focus Workshops, Video Loan Program, Consultation for In-house Programs); (3) Academic Library Program (Leadership Development Program, Preservation Planning Program, Public Services Study, Collection Analysis Project, Organizational Screening, Planning Program for Small Academic Libraries, Academic Library Development Program, Management Review and Analysis Program); (3) Systems and Procedures Exchange Center (SPEC) (SPEC Kits and Flyers, Collaborative Research Writing Program, Automation Inventory, Published Research); and (4) Priorities for 1990 (Research and Development, Academic Library Program, Systems and Procedures Exchange Center, Organizational Training and Staff Development). Concluding the report are lists of articles and presentations by OMS staff, titles of OMS publications, biographical profiles of OMS staff, the names of the Consultant Training Program participants and North American Collection Inventory Project consultants, and a list of libraries that have participated in OMS programs. (MAB)

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ANNUAL REPORT

1989

ASSOCIATION OF RESEARCH LIBRARIES

OFFICE OF MANAGEMENT SERVICES

IR 053758

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OMS ANNUAL REPORT

1989

Office of Management Services
Association of Research Libraries
1527 New Hampshire Avenue, NW
Washington, DC 20036
(202) 232-8656

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Introduction

Nineteen eighty-nine marked the Office of Management Services' twentieth year of operation. Since 1970, OMS has changed its name twice, grown from two to seven staff, carried out over three hundred consulting projects, operated over two hundred workshops and institutes for over four thousand librarians, published over two hundred publications, trained over a hundred library staff as consultants and trainers, and worked with academic librarians in eight countries.

While OMS's mission "to provide assistance to research libraries in the effective management of their resources" has remained unchanged, its programmatic interpretation of that mission has changed dramatically, moving well beyond the traditional aspects of "management." Currently OMS offers consulting programs in general management, public services, collection management, preservation, strategic planning, and organizational diagnosis. Its training program includes institutes and workshops on management, creativity, analytical skills, supervision, and training skills. Its publications cover a broad spectrum of library issues in human resource and general management, as well as in technical and professional areas. During 1990, OMS will develop new consulting and training programs on resource management and cultural diversity, and a new institute on collection evaluation.

Over the past twenty years, OMS has received vital support from many individuals and organizations. It has benefited from the financial and advisory support of the ARL membership and particularly from the ARL Committee on the Management of Research Library Resources. Several foundations and government agencies have provided major financial support, notably the Council on Library Resources, the Andrew W. Mellon Foundation, the Lilly Endowment, the H. W. Wilson Foundation, and the National Endowment for the Humanities. And individual librarians from all types and sizes of libraries have provided ideas and feedback that have made our work particularly rewarding.

In addition to the full-time OMS staff, since 1979 OMS has worked with several librarians who are identified as adjunct staff. These friends and colleagues serve as OMS trainers at institutes and as consultants on OMS assisted self-study projects. All are either former OMS staff, past participants in an OMS Consultant Training Program, or, in a few instances, both. Without this group of talented librarians, the OMS could not maintain its current level of activity, and we appreciate the many contributions they have made and continue to make OMS.

- Jeffrey Gardner

The Office of Management Services

The Office of Management Services (OMS) was established in 1970 to help research and academic libraries develop better ways of managing their human and material resources and to work with libraries in determining the best way to meet the needs of their users. To achieve these ends, OMS operates the Organizational Training and Staff Development Program; offers consultation and assisted self-study services; and publishes a monthly series covering library issues as well as research papers and project manuals. OMS programs and resources focus on library management, collection development, preservation of library materials, public services, and human resource development.

Founded with support from the Council on Library Resources, OMS has received funding from a variety of sources since 1970. These include the Association of Research Libraries (ARL), the Council on Library Resources, the Andrew W. Mellon Foundation, the General Electric Foundation, the National Endowment for the Humanities, the Lilly Endowment, Inc., and the H.W. Wilson Foundation.

Ongoing services and publications are supported by user fees. Guidance is provided by the ARL Committee on the Management of Research Library Resources and other project-related advisory groups.

Jeffrey Gardner has been Director of OMS since 1988, having been Acting Director of OMS since November 1, 1987. Susan Jurow was named Associate Director of the OMS July 1, 1988. Ms. Jurow previously held the position of Program Officer for Training.

ARL Committee on the Management of Research Library Resources

The Committee on the Management of Research Library Resources coordinates ARL's efforts to provide the analytical capabilities required for effective management of the resources of ARL member libraries. The chair of the Committee on ARL Statistics serves as an ex-officio member of the committee.

Toward this goal, the Committee on the Management of Research Library Resources oversees and advises on the work of the OMS; assists in the development of programs and activities suited to the needs of ARL member libraries as well as securing the financial resources needed to support them; assesses OMS performance in achieving its goals and the effectiveness of its programs; and recommends OMS policy and program priorities to the ARL Board.

1989 ARL Committee on the Management of Research Library Resources

John Black, *University of Guelph*

Jerry D. Campbell, *Duke University*

Sheila Creth, *University of Iowa*

Joanne Euster, *Rutgers University*

Sul H. Lee, Chair, *University of Oklahoma*

Thomas Shaughnessy, ex-officio, *University of Missouri*

Peter Spyers-Duran, *Wayne State University*

Jerome Yavarkovsky, *New York State Library*

Summary of 1989 Activities

Applied Research and Development

North American Collections Inventory Project (NCIP)

* Worked with staff at the University of North Carolina to develop and test the microcomputer-based Conspectus system.

* Published a revision of the *Manual for the North American Inventory of Research Library Collections.*

* Expanded and updated Conspectus documentation to facilitate data entry of completed worksheets prepared by non-RLG ARL libraries.

* Distributed the NCIP questionnaire to provide a profile of participation in NCIP, aid in the preparation of a SPEC Kit on the Conspectus, and assist in charting future directions of NCIP.

Academic Library Program

* Received a grant of $145,167 from the National Endowment for the Humanities Office of Preservation in support of preservation planning in research libraries.

* Facilitated more than twenty institutions in the United States and Canada in self-studies as part of the Academic Library Program, including six Leadership Development Programs, two Public Services Studies, nine Preservation Planning Programs, one Collection Analysis Project, and two Organizational Screening Programs.

Systems and Procedures Exchange Center

* Topics covered by SPEC Kits and Flyers included building security and personal safety, collection analysis, brittle books, statistics, computerized online bibliographic searching, access to collections by visiting scholars, automated authority control, fee-based library services, strategic plans, and administration of computer files. More than 400 SPEC subscriptions were maintained, and more than 7,000 SPEC Kits were distributed. OMS Occasional Paper No. 15, *Interlibrary Loan in Academic and Research Libraries: Workload and Staffing* was published.

Training and Staff Development

* Five public and twelve sponsored Management Skills Institutes were conducted in 1989. Eight special focus workshops and presentations were completed, as well as a Preservation Consultants Workshop. Two new programs, a Resources Management Institute and a Collection Evaluation Institute, were developed for implementation in 1990.

* Rhonda MacInnes, a member of the in-house training team at the National Library of Canada, spent 1989 as an intern with the OMS Training Program. Rhonda helped to design and deliver twenty workshops over the course of the year. Her energy, enthusiasm, and hard work made her a major asset to the program. She will continue to work with OMS in the capacity of adjunct staff in 1990.

* More than 500 library staff participated in OMS training programs throughout 1989.

* The Video Loan Program was developed as a vehicle for libraries to access management videos at a cost savings.

Additional OMS Activities

OMS staff worked with a number of ARL committees and task forces in 1989, contributing to the ongoing programs of the Association. OMS staff also coordinated the ARL/OMS Library Showcase booth at the ALA Annual Conference in Dallas. The theme of the exhibit was "Innovation Achieved by Research Libraries." The exhibit featured multi-media presentations by three member libraries: Washington State University, Iowa State University, and the University of Illinois at Chicago.

Applied Research and Development

Activities aimed at developing funding proposals and new services or the study of special issues

With the advice and support of the ARL Committee on the Management of Research Library Resources, OMS participates in selected separately funded projects, develops new programs to benefit ARL members, and assists research projects operated by other agencies and libraries. In 1989, OMS was actively involved in the following research and development activities.

Training Program for Preservation Administrators

In October 1988, OMS received a grant from the National Endowment of the Humanities Office of Preservation to fund a program to help research libraries establish a preservation program. A major component of the program was a Preservation Consultants Workshop for six experienced preservation librarians, which was held March 5–10, 1989. The workshop prepared this cadre of preservation specialists to assist libraries in planning and carrying out the Preservation Planning Program. Attesting to the importance of this effort, an additional ten preservation librarians participated in the workshop with support from their parent institutions.

New Staff Development Program

Resource Management Institute

The design of this 3 1/2-day institute was completed in 1988, and its first presentation will be February 1990, in Washington, D.C. Its primary goal is to help library managers make sound resource decisions using financial tools which are already available. Participants will pursue this goal by exploring the actual and potential roles of financial management systems in improving organizational performance.

North American Collections Inventory Project (NCIP)

OMS, working with the Research Libraries Group, Inc. (RLG), began the North American Collections Inventory Project (NCIP) in July 1983 as a cooperative effort intended to involve research libraries throughout the United States and Canada. The project's long-term goal is to develop an online North American inventory of research collections which can assist scholars in locating materials needed to support their research. It is also expected that the inventory will strengthen coordinated management of North American research collections and help to determine shared responsibilities for maintaining these vital resources.

Full-scale implementation of the North American Collections Inventory Project was funded by the Andrew W. Mellon Foundation for a three-year period which ended on June 30, 1988.

At the conclusion of the Mellon project, the OMS switched advisory responsibilities for the project from the NCIP Advisory Committee to the ARL Committee on Collection Development, and developed a cost recovery strategy to support the project's work. The procedures and financial plans were designed to maintain the NCIP support activities and services as an integral part of OMS operations.

Current efforts are directed toward ensuring ongoing project participation by libraries that have begun the project as well as providing start-up services to new participants. Development and revision of Conspectus worksheets continues as cooperative efforts with RLG.

During 1989, new and revised Conspectus materials and resources were released through NCIP, including:

* revised Political Science Conspectus Worksheets with Supplementary Guidelines;

* RLG Conspectus Searching Basics.

A series of additional resources are under development. While these revisions and enhancements will contribute to the vitality of the Conspectus, the process of building the tool is now essentially completed.

During the 1989 ALA Midwinter Meeting in Washington, OMS held an NCIP Open House, and the NCIP Users' Group meeting was held during the ALA Annual Conference in Dallas.

As part of the OMS Collaborative Research Writing Program, Deborah Jakubs (Duke University) prepared a SPEC Kit on the Conspectus Methodology. The Kit describes libraries' purposes in undertaking Conspectus assessments, organizational arrangements made to carry out the assessments, and results and benefits of participating. The SPEC Kit was published in February 1989.

OMS staff worked with the University of North Carolina-Chapel Hill Collection Development Department to develop the microcomputer-based Conspectus System. The pilot version of the system was tested at five sites. Based on the results, the UNC staff decided to make several major changes in the design of the system. OMS plans to distribute the final version of the UNC-CH Conspectus System as soon as the program is completed.

Organizational Training and Staff Development

As part of its mission to help academic and research libraries find better ways of developing their human resources, OMS offers a comprehensive program of training and consulting. This program reflects OMS's conviction that improving the performance of libraries requires strong individual leadership, effective management, and specialized training programs to develop staff competence.

Management Skills Institutes are conducted by OMS staff with the assistance of OMS-trained facilitators. For more than eight years these adjunct staff have contributed to the successful operation of more than fifty institutes.

OMS Adjunct Staff

Shelley Phipps, *Assistant University Librarian for Branch Services, University of Arizona*

Patricia Swanson, *Assistant Director for Science Libraries, University of Chicago*

Maureen Sullivan, *Head, Personnel Services, Yale University Library System*

George Soete, *Associate University Librarian for Collections, University of California, San Diego*

Throughout 1989, OMS maintained its full range of institutes and special focus workshops, including eleven Institutes on Basic and Advanced Management Skills. These programs provide individuals with opportunities for assessment of current skill levels, an overview of current management concepts, and an introduction to specific skills required for effective library management.

The institutes operate on the principle that participants accept learning as their own responsibility. Each institute includes structured exercises, case studies, selected readings, experiential sessions modeled on daily library operations, and an OMS Study Guide that supports the training.

Basic Management Skills Institute

This 3 1/2 day institute focuses on the individual's relationship to the library organization and to others within the organization: subordinates, peers, and upper management. Through self-awareness tools and learning experiences, participants have an opportunity to reflect on their current approach to managerial and supervisory responsibilities. The institute also systematically introduces and reviews a range of concepts and techniques associated with effective management. The goal is to broaden the manager's ability to function in his or her role and to contribute to the organization as a whole. In 1989, a total of 231 librarians attended Basic Management Skills Institutes held in Minneapolis, Baltimore, Rosslyn, VA, Howard University, the New York Public Library, the University of Florida, the University of Tennessee, and the Columbia University Computing Center.

Advanced Management Skills Institute

Designed for senior managers and those seeking proficiency in top-level executive responsibilities, this 5 1/2-day Institute focuses on the individual's ability to have a positive influence on the overall performance of the organization. Through simulation of a library organization, participants

observe the effects of interventions on the system as a whole. The sessions emphasize executive leadership, planning and goal-setting, building management teams, information requirements of executive decision-making, and organizational diagnosis and change. Participants receive a number of well-tested survey instruments which serve as the basis for a self-assessment and personal awareness profile. The results of these surveys assist in the process of connecting the workshop agenda to experiences in the work environment. More than 120 participants attended this institute in 1989, at Denver, Washington, DC, Emory University, and the University of Alberta.

Creativity to Innovation Workshop: Breaking the Bonds of Traditional Thinking

Creativity is a tool to generate, evaluate, and implement new ideas, to reshape and redefine problems, and to promote fluidity and flexibility of thought. The creative problem-solving exercises in this 2 1/2 day Institute are the focal point of creativity, the mental languages we use to define our worlds, recognizing and removing barriers to creative thought, understanding and exploiting individual styles of creativity, and encouraging innovation in our organizations.

Each participant is given a pre-workshop assignment that focuses on problem identification and exploration. Once at the workshop, potential solutions are produced for each individual's problem, using a creative problem-solving process that involves brain storming, brainwriting, visual connections, and novel scenarios. The Creativity to Innovation Workshop was held three times in 1989. It was offered with open enrollment in New Orleans, and was sponsored by the University of Florida and the National Library of Canada.

Library Analytical Skills Institutes

The increasing size and complexity libraries has intensified competition for resources. In response, library managers recognize a need to approach organizational problems more analytically and creatively. This 3 1/2-day institute is designed for library professionals seeking to expand their problem-solving and project planning skills.

The focus is on strengthening the skills needed to effectively observe, diagnose, and initiate changes in library operations. Participants have an opportunity to use the resources of an academic research library and simulate an examination of library operations. In 1989, the libraries of Harvard University and the Massachusetts Institute of Technology sponsored a 5 1/2 day workshop that combined the Analytical Skills Institute with the Creativity to Innovation Workshop.

Managing the Learning Process

Library administrators recognize that staff development plays a crucial role in the ongoing effectiveness of individuals within the organization. Because resources are scarce, administrators need to get the most from their training dollars. This 3 1/2-day institute is designed to provide a conceptual framework for the provision of training, as well as methods and techniques to carry out

the work. With these skills library staff can make better judgments about what kind of training will have a significant impact on library operations. This program can also form the basis of an inhouse training program at their home institution.

Management Institute for Assistant/Associate Directors

A new Management Institute for Assistant/Associate Directors in ARL Libraries was held in 1989. Patterned after an earlier series of Institutes for AULs, this Institute explored three broad themes: shaping organizational culture, encouraging creativity in the workplace, and teambuilding/effective use of groups. The three topics were chosen by past and potential participants from a list of eight issues.

The Institute provides a model-based examination of the three management themes, while providing an opportunity for senior managers from ARL libraries to meet and explore issues with others who share the common organizational experiences of large academics and research libraries.

Special Focus Workshops

These short, one or two-day programs cover a single topic or two closely related topics selected by an individual library. They have proven to be most useful to libraries faced with new situations that affect a large portion of the staff and require a clear understanding of organizational goals. OMS designs the programs to meet the specific needs of the individual library. In 1989 workshops were prepared on Creativity, Training the Trainer, and Risktaking. The programs provide a mixture of conceptual models and working techniques, and include self-assessment tools and case studies that relate those concepts to the academic library environment. Other workshop topics include time management, strategic planning, team building and group decision-making, program evaluation, time management, supervisory skills, conflict resolution, and using behavior pattern analysis as an organizational tool.

Video Loan Program

The Video Loan Program was initiated in 1989 to make management and training videos available inexpensively. The program operates similarly to local video clubs. Subscribers pay an initial membership fee and then pay only postage and handling fees for each rental. Currently, eleven titles are available as part of the program; there are twenty-seven subscribers.

Consultation for In-House Programs

The OMS staff provides assistance and resources to libraries interested in in-house staff training and development programs. Especially valuable to libraries unable to devote staff time and efforts to developing such programs, this consultative service creates training materials oriented to the specific needs of the library. The library staff plays a major role in conducting the programs, often adapting commercially available materials and implementing self-administered tools. In many instances, the consultants are graduates of the OMS Consultant Training Program, a group of library professionals working in library operations who have completed extensive training in program assessment and operation.

Academic Library Program

Activities related to conducting institutional studies and consultations

OMS provides programs for libraries to systematically study their internal operations and develop workable plans for improvement. With the assistance of trained consultants, libraries use tested methodologies to conduct assisted self-studies. OMS provides onsite and telephone consultation, staff training, manuals and other resources to aid in gathering and analyzing information. These studies take from three to twelve months to complete, with groups of library staff meeting three to four hours per week. Individuals spend additional hours studying, gathering data, and analyzing their findings. In this way, participating libraries gain insight into their current situation and develop sound programs for change and improvement.

Assessments have contributed to accreditation efforts, parent institutions' planning processes, the introduction of new services, and the resolution of organization problems. Libraries often use their final reports to gain support for library needs and to highlight their role in the future of the parent institution. Self-studies also improve the analytical and problem-solving skills of staff and build staff motivation. Faculty-library relations are often improved as well because the studies clarify interests, perceptions, and expectations.

During 1989, over twenty institutions were involved in conducting self-studies. A brief description of each type of self-study follows.

Leadership Development Program

This program is an exercise in strategic planning geared to senior management staff of large research libraries. It provides opportunities to examine options for future development and to consider making changes. During a 3 1/2-day retreat, participants consider library alternatives and strategies; evaluate ways to deliver services more effectively given available resources; and discuss possible adjustments in service philosophy and staff values. To date, the program has been offered only to members of the ARL. Libraries participating in the program in 1989 include the University of Connecticut, Purdue University, Iowa College and Research Libraries, the Columbia University Computing Center, the New York Public Library, and Michigan State University.

Preservation Planning Program

Geared to large and mid-sized academic and research institutions, this program helps libraries identify their current preservation activities and set priorities as part of a comprehensive long-range planning effort. Participants also have an opportunity to assess the potential impact of emerging national developments on their internal programs.

In September 1988, the Office received a grant from the National Endowment for the Humanities Office of Preservation in

support of preservation planning in research libraries. Ten ARL libraries were selected to conduct preservation planning studies and their participation is in part supported by this grant. Libraries participating in their program during 1989 included the University of Arizona, the University of Colorado, the University of Delaware, Duke University, the University of Georgia, the University of Kentucky, Oklahoma State University, Purdue University, Syracuse University, and the Boston Public Library. The University of Florida, the National Agricultural Library, the University of Southern California, and the Washington Research Library Consortium also conducted preservation planning programs.

The NEH grant also supported a Preservation Consultants Workshop for experienced preservation librarians, held in March 5–10, 1989, in Washington, D.C. The workshop was intended to prepare this cadre of preservation specialists to assist libraries in planning and carrying out the Preservation Planning Program.

During 1989, five newly trained preservation consultants worked with OMS staff to assist libraries in planning and carrying out the Preservation Planning Program.

A third component of the grant is funding the evaluation of the program by Preservation Consultant Margaret Child. Her evaluation report will be completed in fall 1990.

Public Services Study

This program provides a framework for short or long-term strategic planning of public services. In the context of emerging technologies and changing user needs, it focuses on: describing and inventorying services; assessing user needs and services performance; examining organization, staffing and management of services; planning for and using new technology; developing facilities requirements; and articulating a public services program. It has been designed for large and mid-sized research and academic libraries. Libraries participating in the program in 1989 include the University of Pittsburgh and the State University of New York at Buffalo.

Collection Analysis Project

This program provides a framework for assessing collection development practices and policies. It includes modules on: collection history and description; collection objectives and policies; funding allocations for materials; organization and staffing of collection development functions; collection assessment; and preservation and resource sharing. Both research and academic libraries can benefit from this program. Libraries participating in the program in 1989 include Wake Forest University.

Organizational Screening

This is an intensive program, centering around a specific issue such as reorganization design, team-building, or planning. It can be used by any size library. Libraries participating in the program in 1989 include the University of Toronto and the University of Maine.

Planning Program For Small Academic Libraries

This program, designed specifically for libraries with staffs of less than twenty, assists in the development of plans for instruction and research services. Participants examine policies, library user needs, service delivery, and management.

Academic Library Development Program

This provides a comprehensive assessment of all aspects of library programs, including operations, services, management practices, facilities, and changing technological needs. It was designed for mid-sized libraries.

Management Review and Analysis Program

This program covers planning, budgeting, policy making, management information, supervision and leadership, organization, personnel practices, staff development, and executive leadership. It is offered to libraries with fifty or more staff members.

Systems and Procedures Exchange Center (SPEC)

SPEC was established in 1973 to gather, analyze, and distribute information and descriptive materials on contemporary management techniques as they are developed by academic libraries. The center conducts surveys and collects documents including manuals, policy statements, planning materials, committee reports, job descriptions, procedures, brochures, user studies and results, and newsletters. From this collection, materials are selected for presentation in SPEC Kits, which are issued ten times each year.

The center also publishes analytical reviews on management topics and facilitates the exchange of information in an effort to promote experimentation and innovation based on successful programs at member libraries.

SPEC Kits and Flyers

SPEC Kits are collections of selected library documents concerning specific areas of library management. They are prepared by OMS staff and Collaborative Research Writers—librarians selected for their experience and knowledge. Criteria for inclusion of documents are: relevance to management or administrative perspectives; timeliness; usefulness to other libraries; direct relationship to the area of concern; and distinctiveness. Designed to illustrate alternatives and innovative solutions, the Kits describe both the administrative and operational aspects of a particular issue. Each Kit also includes a selected reading list.

A two-page SPEC Flyer introduces each Kit. Flyers are based on materials submitted by ARL libraries, a review of current literature, and information obtained during interviews. The Flyers focus on emerging trends and innovations in academic and research library management and operation. The trends highlighted are the result of in-depth analysis of documents and survey results. Designed to provide a quick picture of state-of-the-art activities and developments in the field, the Flyers give perspective to the content of the SPEC Kits.

Originally provided only to ARL members, SPEC Kits and Flyers are now sent to an additional 350 library subscribers. Although the majority of these libraries are associated with universities or colleges, 25 percent are public or special libraries. SPEC Kits and Flyers are available through library distributors, subscription agents, and vendors.

The following Kits were published in 1989.

#150 – *Building Security and Personal Safety*

#151 – *Qualitative Collection Analysis*

#152 – *Brittle Books Programs*

#153 – *Use of Management Statistics in ARL Libraries*

#154 – *Computerized Online Bibliographic Searching in ARL Libraries*

#155 – *Onsite Access to Library Collections by Visiting Scholars*

#156 – *Automated Authority Control in ARL Libraries*

#157 – *Fee-Based Services in ARL Libraries*

#158 – *Strategic Plans in ARL Libraries*

#159 – *Administration of Library-Owned Computer Files*

Collaborative Research Writing Program (CRW)

In this program, librarians work with OMS staff in joint research and writing projects which are then published by OMS. Participants and staff work together in survey design, writing and editing, and seeking management perspectives on current academic concerns. Throughout a Collaborative Research Writing project, which operates over a five- to six-month time frame, a librarian works from his home library.

Automation Inventory

The *Automation Inventory of Research Libraries* features tables and listings that characterize the state of automation in ARL institutions. The publication provides administrators with an overview of trends, and provides systems librarians with information on specific automation applications. The fourth edition, published in 1988, covered nineteen automated functions according to six descriptive elements: operating status, extent of system, computer ownership/use, public access, number of workstations, and name of vendor or network. It also contains analysis of aggregate information from individual library profiles.

Data for the fifth *Automation Inventory* were collected during 1989, and will be published in 1990.

Published Research

Occasional Papers are the result of in-depth investigation and analysis of the issues covered in SPEC Kits. They focus on current practices and propose alternative systems in specific management areas. A discussion of trends and issues is often included.

The most recent paper, published in October 1989, is OMS Occasional Paper No. 15, *Interlibrary Loan in Academic and Research Libraries: Workload and Staffing*, by Pat Weaver-Meyers, Shelly Clement, and Carolyn Mahin.

Priorities for 1990

During 1990, initiatives will be considered in the following areas:

* developing initiatives for grants to support new programs in the areas of technology—applications for hypertext in libraries, and introducing new technology into libraries and the resulting management issues—and cultural diversity.

* hiring a new Program Officer for Training

OMS will also be seeking external funding support for a technical services study and a demonstration project using the North American Collections Inventory for cooperative activities.

As in the past, OMS will continue to work with other ARL committees on projects of special interest and importance, most notably in the areas of preservation and statistics.

Research and Development

The primary activities in this area will include:

* developing plans and procedures for distributing the RLG Conspectus software for microcomputers.

* designing and planning a series of collection management and development workshops to provide training in budget allocation and management, training and supervision of selectors, and cooperative collection management.

Academic Library Program

The primary activities in this area will include:

* exploring the potential for a performance assessment program and an organizational diagnosis model.

* developing an organizational simulation module for use in training and assessment programs.

* preparing and promoting strategic planning program and teambuilding interventions.

* developing a small college program in conjunction with the Association of College and Research Libraries.

OMS expects to start up to ten new library studies in the areas of collection, preservation, public service, and leadership development. Self-study resources will be maintained in the following eight areas, with emphasis on the first four:

* Leadership Development Program
* Preservation Planning Program
* Public Services Study
* Collection Analysis Project
* Organizational Screening
* Planning Program for Small Academic Libraries
* Academic Library Development Program
* Management Review and Analysis Program

Organizational Training and Staff Development

* OMS will develop and implement two new institutes:
  - Resource Management Institute, focusing on financial skills for librarians.
  - Collection Evaluation Institute, focusing on assessing and enhancing collection effectiveness, planning, and implementing collection evaluation projects.

In 1990, OMS will offer two Basic Library Management Skills Institutes, one Advanced Library Management Skills Institute, and one Library Analytical Skills Institute. Managing the Learning Process in Libraries, Creativity to Innovation Workshop, and the Resource Management Institute will each be offered once in 1990.

OMS will conduct up to eight additional Management Skills Institutes on a sponsored basis, and up to fifteen Special Focus Workshops.

Systems and Procedures Exchange Center (SPEC)

The primary activities in this area will include:

* expanding the subscription basis for SPEC publications.
* investigating application of electronic publishing technologies within the OMS publications program.
* expanding the contributing writers pool and publications topic list.
* developing two new publication series, focusing on innovative programs and activities in ARL libraries, and a review of management issues in academic and research libraries for library administrators.

Other Activities

OMS will also work with ARL committees on collection development, bibliographic control, preservation, and statistics projects.

Articles and Presentations by OMS Staff

"Client-Centered Collection Evaluation." Jutta Reed-Scott at Metro Collection Assessment Institute, New York, NY, June 2, 1989.

"Information Technologies and Collection Development," in *Collection Management: Current Issues*, edited by Sarah Shoemaker. (New York: Neal Schuman Publishers, 1989), pp. 47-51.

"North American Collections Inventory Project: Implications for the Future of Collection Management of Research Collections." David Farrell and Jutta Reed-Scott, in *Library Resources and Technical Services* 33 (January 1989):15-28.

"Preservation Analysis and Collection Management." Jutta Reed-Scott at AMIGOS Bibliographic Council Spring 1989 Membership Meeting, Dallas, TX, May 16, 1989.

"Publish or Perish: The Future of Journal Collections in Libraries." Jeffrey Gardner, Panel Moderator, at ALA Annual Conference, Dallas, TX, June 24, 1989.

"The ARL Serials Prices Project." Jeffrey Gardner, Poster Session at ALA Annual Conference, Dallas, TX, June 25, 1989.

"What's Up in the United States." Jeffrey Gardner at the annual conference of the UCPPC, Christ Church College, Oxford University, England, September 26, 1989.

OMS Staff

Jeffrey J. Gardner

Director of OMS since May, 1988, Mr. Gardner works to strengthen the management capacity of the 119 ARL member libraries. He is responsible for supervising and training in the areas of collection development and management, and he operates the Collection Analysis Project which he designed for OMS. In addition, Mr. Gardner manages the North American Collections Inventory Project (NCIP), works with academic libraries on organizational development projects, and supervises self-studies on public services and collection management.

Mr. Gardner received his B.S. from Tufts University and his M.L.S. at Simmons College. He has worked for public, special, and university libraries including M.I.T. where he was director of the Project Intrex Model Library Program from 1967 to 1973. He then joined the Office of Management Studies as Management Research Specialist, and served as Associate Director from 1978 to 1987.

Susan Jurow

Associate Director of OMS, Ms. Jurow assesses library training needs, designs training resources and services, and conducts training and staff development programs. These include the Organizational Training and Staff Development Program, management and operational workshops as well as specialized institutes, seminars, and consultation for in-house programs. She monitors emerging professional and management developments in order to design programs that meet the unique needs of academic and research libraries.

Prior to joining OMS, Ms. Jurow was Assistant to the Director of the Northern Regional Library Facility, University of California, Richmond Field Station. She has also served as acting head of the Reference Department, M.D. Anderson Library, University of Houston; business reference librarian and coordinator of Computerized Information Retrieval Services at the University of Houston Library; and Head of the Current Periodicals and Microtexts Division at Stanford University's Green Library. She received her B.A. from Stanford University and her M.L.S. from Rutgers University.

Rhonda MacInnes

As ARL Visiting Program Officer, Ms. MacInnes is the Training Intern at the Office of Management Services. She acts as trainer for OMS workshops, assists in workshop design, revises training material, coordinates programs with consultants, and oversees arrangements for Management Institutes. Ms. MacInnes is currently on developmental leave for educational purposes from the National Library of Canada, where she is a member of their in-house training program. Her one-year sojourn in the States is, in part, a year of study, and her duties include reading widely and comprehensively on management topics, as well as acquiring and polishing her training skills.

Ms. MacInnes received a B.A. and M.A. in English from Carleton University in Ottawa, and has a teaching degree from Queen's University in Kingston, Ontario.

Jutta Reed-Scott

Since 1983, Jutta Reed-Scott has served as Collection Development Specialist and Project Coordinator for OMS. She is a principal investigator for the North American Collections Inventory Project, developing technical documentation, providing training, and coordinating collection evaluations in research libraries. Ms. Reed-Scott also managed Preservation Planning Program studies funded by the National Endowment for the Humanities as well as those operated under the Academic Library Program.

Prior to her work at OMS, Ms. Reed-Scott served as Director of Collection Development and Bibliographic Control at Dartmouth College Library; as Collections Development Librarian at Massachusetts Institute of Technology; Associate Humanities Librarian at M.I.T., and as head of the Reference Department of George Washington University. She received a B.A. in history from the University of Maryland, and an M.A. in Library Science from the School of Library and Information Service, University of Maryland.

Marianne Seales

As Office Manager and Meeting Planner, Ms. Seales provides administrative and operational support to the entire OMS professional staff. She assists in scheduling, producing and maintaining office services and resources; serves as administrative assistant for the Director; and assists the Associate Director in all training events. Ms. Seales' responsibilities also include arranging meeting space, housing, schedules, and travel; preparing monthly, quarterly and project progress reports; and assisting in the final preparation of OMS publications.

Prior to joining OMS in 1983, Ms. Seales served as Administrative Assistant to the Membership Development Coordinator for the National Association of Social Workers. She received a B.S. in Sociology from Tennessee State University in 1981, and has completed a special training program in office management.

Karen A. Welter

Ms. Welter joined OMS in 1985 to work on publication and staff development programs. As Editorial Assistant, she designs and edits the North American Collections Inventory Project newsletter; writes press releases and brochures; provides graphic design services for the office; and produces special publications. She received a B.S. in journalism from the University of Illinois, Champaign-Urbana.

Consultant Training Program

Consultant Training Program (CTP) participants are graduates of OMS Consultation Skills Workshops and practicums held between 1979 and 1983. Since graduating, they have worked on library studies, research and publications, and training programs. CTP graduates have designed study interventions, prepared organizational assessments, and participated in related workshops, institutes, and conferences.

Consultant Training Program Participants

Noreen S. Alldredge, *Dean of Libraries, Montana State University*

Arnold Bellefontaine, *Consultant, San Francisco, CA*

Annalea Bennett, *Sherman Oaks, CA*

Bella Z. Berson, *Associate University Librarian and Director, Medical Library, Yale University*

Martha Bowman, *Director of Libraries, University of Missouri*

Joseph Branin, *Director, Humanities and Social Sciences Libraries, University of Minnesota*

Patricia L. Bril, *Collection Development Officer, California State University, Fullerton*

Joan Chambers, *Director of Libraries, Colorado State University*

Keith Cottam, *Director of Libraries, University of Wyoming*

Mary J. Cronin, *University Librarian, Boston College*

Howard W. Dillon, *Director of Academic Information Services, Columbia University*

Allan J. Dyson, *University Librarian, University of California, Santa Cruz*

Joanne R. Euster, *University Librarian, Rutgers University*

Bela Foltin, *Blacksburg, Virginia*

Alan E. Hagyard, *Physical Science and Geology Librarian, Yale University*

Peter D. Haikalis, *Asst. Director, Readers Services, San Francisco State University*

Clifford H. Haka, *Head, Access Services, Michigan State University*

Shirley Hallblade, *Associate Director, Vanderbilt University*

Larry Hardesty, *Library Director, Eckerd College*

Carolyn Harris, *Asst. Professor, School of Library Service, Columbia University*

Fred Milton Heath, *Director of Libraries, Texas Christian University*

Ellen Hoffmann, *Director of Libraries, York University*

Clinton Howard, *Asst. University Librarian for Collections, University of California, Davis*

Willis M. Hubbard, *College Librarian, Gettysburg College*

Olive C. James, *Director of Libraries, San Francisco State University*

Phyllis E. Jaynes, *Director of User Services, Dartmouth College Library*

William G. Jones, *Asst. University Librarian, University of Illinois at Chicago*

Gail A. Kennedy, *Assoc. Director of Libraries, University of Kentucky*

David F. Kohl, *Asst. Director for Public Services, University of Colorado*

Marianne Kozlowski, *Programmer, MCS Company*

John Kupersmith, *Computer-based Services, University of Texas at Austin*

Ronald Leach, *Dean of Libraries, Indiana State University*

Philip E. Leinbach, *University Librarian, Tulane University Library*

Barbara A. Lockett, *Director of Libraries, Rensselaer Polytechnic Institute*

Charles Lowry, *Library Director, University of Texas at Arlington*

Neosha Ann Mackey, *Assoc. Dean of Libraries, Southwest Missouri State University*

Charles Martell, *Director of Libraries, California State University, Sacramento*

James R. Martin, *Director of Libraries, University of Southern Mississippi*

Connie K. McCarthy, *Asst. University Librarian for Collections, George Washington University*

Patricia McClung, *Assoc. Director of Program Coordination, Research Libraries Group, Inc.*

Donna L. McCool, *Asst. Director for Administrative Services, Washington State University*

David R. McDonald, *Asst. Director for Systems, University of Michigan*

Arthur H. Miller, *College Librarian, Lake Forest College*

R. Bruce Miller, *Asst. University Librarian for Technical Services, University of California, San Diego*

Phyllis S. Mirsky, *Assoc. University Librarian for Sciences, University of California, San Diego*

Margaret Myers, *Director, OLPR, American Library Association*

Julie B. Nye, *Functional Design Manager, Triangle Research Libraries Network*

Roger H. Parent, *Deputy Director, LAMA, American Library Association*

Paul E. Peters, *Director, Coalition for Networked Information*

Anne Peyton, *Assoc. Director, Capital Giving, Dartmouth College Libraries*

Shelley Phipps, *Asst. University Librarian for Branch Services, University of Arizona*

Lance D. Query, *Director, Library Research, Analysis, and Personnel, Northwestern University*

John D. Racine, *Program Director, OCLC, Inc.*

Ann K. Randall, *Chief Librarian City College at CUNY*

Grace M. Reed, *ARMCO*

Anne Reuland, *Information Services Librarian, Vanderbilt University*

Jeanne Richardson, *Collections Development Coordinator, Arizona State University*

Dennis E. Robison, *University Librarian, James Madison University*

Karen L. Sampson, *Manager, Administration, U.S. West Information Systems*

Jordan M. Scepanski, *Director of Libraries, California State University, Long Beach*

D.W. Schneider, *Associate Director of the Library, Louisiana State University*

Beth J. Shapiro, *Deputy Director, Michigan State University Library*

Thomas Shaughnessy, *Director, University of Minnesota Libraries*

Kristen D. Skivington, *Department of Communication, Michigan State University*

George Soete, *Assoc. University Librarian for Collections, University of California, San Diego*

Patricia Swanson, *Asst. Director for Science Libraries, University of Chicago*

John W. Tanno, *Assoc. University Librarian for Planning and Development, University of California, Riverside*

Mary Trochim, *Director, Ithaca Community School of Music and Arts*

Barbara von Wahlde, *Director of Libraries, SUNY–Buffalo*

David Walch, *University Librarian, California Polytechnic State University*

Pat Wand (formerly Silvernail), *Director of Libraries, The American University*

H. Lea Wells, *Library Consultant, Long Beach, California*

Sara Lou Whildin, *Campus Head Librarian, Pennsylvania State University, Delaware County Campus*

Patricia B. Yocum, *Head, Natural Science Library, University of Michigan*

David S. Zeidberg, *Head of Special Collections, University of California, Los Angeles*

NCIP Project Consultants

Five librarians who have contributed to the development of the North American Collections Inventory Project (NCIP) also serve as project consultants and have worked with OMS staff on NCIP workshops. They are:

Joseph Branin, *Director, Humanities and Social Sciences Libraries, University of Minnesota Libraries*

John Clouston, *Assistant University Librarian for Collection Development University of Western Ontario*

David Farrell, *Assistant University Librarian in Collections, University of California, Berkeley*

George Soete, *Associate University Librarian University of California, San Diego*

Patricia Yocum, *Head, Natural Science Library, University of Michigan*

NCIP Consultants

Ross Atkinson, *Assistant University Librarian, Collection Development and Preservation, Cornell University*

Stella Bentley, *Assistant University Librarian for Collection Development, University of California, Santa Barbara*

Anthony W. Ferguson, *Director of Resources and Special Collections, Columbia University*

Charles S. Fineman, *Humanities Bibliographer, Northwestern University Library*

Lelde B. Gilman, *Head of Collection Development, Biomedical Library, University of California, Los Angeles*

Joan Grant, *Director of Collection Management and Consortial Services, New York University Library*

Deborah L. Jakubs, *General Bibliographer, Duke University*

Leslie LaFleur, *Education Library, University of Alberta*

Annette Melville, *Senior Program Officer, Research Libraries Group*

Marcia J. Pankake, *Bibliographer, University of Minnesota*

Anna H. Perrault, *Humanities Bibliographer, Louisiana State University*

Assunta Pisani, *Associate Librarian for Collection Development, Harvard College Library*

Joel S. Rutstein, *Assistant Director for Collection Services, Colorado State University*

Mary Jane Starr, *Deputy Director, Corporate Communications Division, External Affairs and International Trade Canada*

Libraries that have Participated in OMS Programs

University of Alberta
Arizona State University
Ball State University
Bloomsburg University
Boston University
Brandeis University
Brigham Young University
Brown University
Butler University
California State University
Carlton College
Case Western Reserve University
Catholic University
Cornell University
Columbia University
Center for Research Libraries
Colorado State University
Dartmouth College
DePaw University
Drew University
Duke University
Earlham College
Franklin & Marshall College
Gannon University
George Washington University
Georgetown University
Georgetown Law Library
Goshen College
Hanover College
Hope College
Howard University
Huntington College
Johns Hopkins University
Illinois Wesleyan
Indiana University
Iowa State University
Manchester College
Mankato State University
Massachusetts Institute of Technology
McGill University
Michigan State University
National Agricultural Library
National Oceanic and Atmospheric Administration
National Library of Canada
National Library of Medicine
New Mexico State University
New York Public Library
Newberry Library
North Park College
North Texas State University
Northeastern University
Northwestern University
Ohio State University
Oklahoma State University
Oregon State University
Pennsylvania State University
Purdue University
Rutgers University
Saint Olaf College
Saint Joseph's College
Saint Mary's College
Saint Xavier College
San Francisco State University
San Jose State University
Seattle University
Smithsonian Institution
Southeast Missouri State University
State University of New York, Buffalo
State University of New York, Stony Brook
Southern Illinois University, Edwardsville
Syracuse University
Taylor University
Temple University
Transylvania University
University of Alabama
University of British Columbia
University of California, Berkeley
University of California, Irvine
University of California, Los Angeles
University of California, San Diego
University of California, Santa Barbara
University of Chicago
University of Cincinnati

University of Colorado
University of Connecticut
University of Delaware
University of the District of Columbia
University of Evansville
University of Florida
University of Houston
University of Illinois, Chicago
University of Illinois, Urbana
University of Iowa
University of Kentucky
University of Maine
University of Maryland
University of Massachusetts
University of Michigan
University of Missouri
University of North Carolina
University of Northern Iowa
University of Notre Dame
University of Oregon
University of the Pacific
University of Pittsburgh
University of Rochester
University of Southern California
University of Tennessee
University of Toronto
University of Tulsa
University of Utah
University of Virginia
University of Washington
University of Wisconsin
University of Wisconsin, Parkside
University of Wyoming
Valparaiso University
Vanderbilt University
Wake Forest University
Washington Research Library Consortium
Washington State University
Wayne State University
Widener University
Wittenburg University
Yale University
York University